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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Seth Moulton
Status: Member
State/District: MA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"Called to Serve: Learning to Lead in War and Peace," St. Martin's Press [OT] DESCRIPTION: The value of this asset is unascertainable. This is a book contract.		Undetermined	Royalties	None	<input type="checkbox"/>
Daughter's 529 ⇒ MA Portfolio 2036 (Fidelity Index) [5F] LOCATION: MA	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Dhow Ventures Fund I, LP [HE]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Divergent Technologies, Inc. Series D Preferred Stock [PS] DESCRIPTION: Industrial manufacturing company. Torrance, CA, US.	JT	\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [ST] DESCRIPTION: Partial sales reported on Schedule B. Remainder subject to mandatory redemption for cash on 10/13/2023 upon completion of acquisition of company.	SP	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [OP] DESCRIPTION: Same-day sale exercise of stock options. 9,193 shares expiring 8/19/2023 at strike price of \$86.84. 908 shares expiring 8/19/2023 at strike price of \$82.58. Est. net proceeds from same-day sale of \$30,033.01.	SP	None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ETRADE Investment Account ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Lazard Global Listed Infrastructure Ptf Insti Shs (GLIFX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Vanguard Short-Term Treasury ETF (VGSH) [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Trade placed on 12/28/23, settled on 1/02/24.					
Fidelity Investments Transfer of Death Account ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Iris Investment Holdings, LLC ⇒ Iris Technology, Inc. [PS]		\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Information technology company. Grand Rapids, MI.					
Liz: Fidelity Investments IRA#1 ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).					
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(VBIRX) [MF]					
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).					
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Marblehead Bank account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Niece's 529 Account ⇒ American Funds College 2033 Fund Class 529-A [5F] LOCATION: MA		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Oura Health OY Series C Preferred Shares [PS] DESCRIPTION: Health technology company. Oulu, Finland.	JT	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Residential property located in Salem, MA [RP] LOCATION: Salem / Essex, MA, US	JT	\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF] DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).					
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF] DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]					
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1 - \$1,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Iris Investment Holdings, LLC ⇒ Iris Technology, Inc. [PS] DESCRIPTION: Information technology company. Grand Rapids, MI.		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Suckerz, Inc. SAFE Preferred Stock [PS] DESCRIPTION: Food and beverage company. Marina Del Rey, CA, US.	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Thea's 529 ⇒ NH Portfolio 2030 (Fidelity Funds) [5F] LOCATION: NH	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
USAA accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

* Investment vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dhow Ventures Fund I, LP [HE]	JT	09/26/2023	P	\$15,001 - \$50,000	
Divergent Technologies, Inc. Series D Preferred Stock [PS]	JT	08/2/2023	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Digital industrial manufacturing company, Torrance, CA, US.					
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [ST]	SP	03/14/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [ST]	SP	06/13/2023	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [OP]	SP	08/18/2023	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Same-day sale exercise of stock options. 9,193 shares expiring 8/19/2023 at strike price of \$86.84. 908 shares expiring 8/19/2023 at strike price of \$82.58. Est. net proceeds from same-day sale of \$30,033.01.					
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	JT	12/29/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	JT	12/29/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	JT	12/29/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	JT	12/29/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	JT	04/6/2023	P	\$15,001 - \$50,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	JT	12/29/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	04/6/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	12/29/2023	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	04/6/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	10/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	11/21/2023	P	\$250,001 - \$500,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	12/29/2023	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	12/29/2023	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	JT	04/6/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Vanguard Short-Term Treasury ETF (VGSB) [EF]	JT	12/28/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Trade placed on 12/28/23, settled on 1/02/24.					
Fidelity Investments Transfer of Death Account ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]	JT	04/6/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Iris Investment Holdings, LLC ⇒ Iris Investment Holdings, LLC [OI]		01/4/2023	P	\$15,001 - \$50,000	
DESCRIPTION: Purchase of 24 units in LLC, to be converted to preferred shares in Iris Technology, Inc.					
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]	SP	12/29/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	12/29/2023	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	SP	12/29/2023	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares	SP	06/23/2023	E	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(BAISX) [MF]					
DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).					
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	04/6/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).					
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	04/6/2023	P	\$15,001 - \$50,000	
Liz: Fidelity Investments IRA#1 ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	SP	04/6/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]	SP	04/6/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	04/6/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).					
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	04/6/2023	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#2 ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]	SP	04/6/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]		04/6/2023	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Rollover IRA ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]		04/6/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares		04/6/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(BAISX) [MF]					
DESCRIPTION: Asset merged from Brown Advisory Total Return Class Inst. (BAFTX) into Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) on 6/23/23. Asset previously reported as Brown Advisory Total Return Class Inst. (BAFTX).					
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]		04/6/2023	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		01/3/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		04/6/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Iris Investment Holdings, LLC [OI]		01/5/2023	P	\$15,001 - \$50,000	
DESCRIPTION: Purchase of 25 units in LLC, to be converted to preferred shares in Iris Technology, Inc.					
Seth: Fidelity Investments Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		04/6/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]		04/6/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Suckerz, Inc. SAFE Preferred Stock [PS]	JT	07/30/2023	P	\$15,001 - \$50,000	
DESCRIPTION: Purchase of SAFE Note. Food and beverage company, Marina Del Ray, CA, US.					

* Investment vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Activision	Spouse salary	N/A
Elevate Sports Ventures, Inc.	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Marblehead Bank	February 2022	Home equity line of credit	\$250,001 - \$500,000
JT	Marblehead Bank	April 2020	Personal residence mortgage	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Schmidt Futures	07/6/2023	07/9/2023	Boston, Massachusetts - Bozeman, Montana - Boston, Massachusetts	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COMMENTS: Congressman Moulton paid for his flights personally.							

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Daughter's 529 (Owner: SP)
LOCATION: MA
- ETRADE Investment Account (Owner: SP)
LOCATION: US
- Fidelity Investments Transfer of Death Account (Owner: JT)
LOCATION: US
- Iris Investment Holdings, LLC
LOCATION: US
- Liz: Fidelity Investments IRA#1 (Owner: SP)
- Liz: Fidelity Investments IRA#2 (Owner: SP)

- Liz: Fidelity Investments Roth IRA (Owner: SP)
- Niece's 529 Account
LOCATION: MA
- Seth: Fidelity Investments Rollover IRA
- Seth: Fidelity Investments Roth IRA
- Seth: Fidelity Investments Roth IRA ⇒ Iris Investment Holdings, LLC
LOCATION: US
- Thea's 529 (Owner: SP)
LOCATION: NY

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Seth Moulton , 05/14/2024